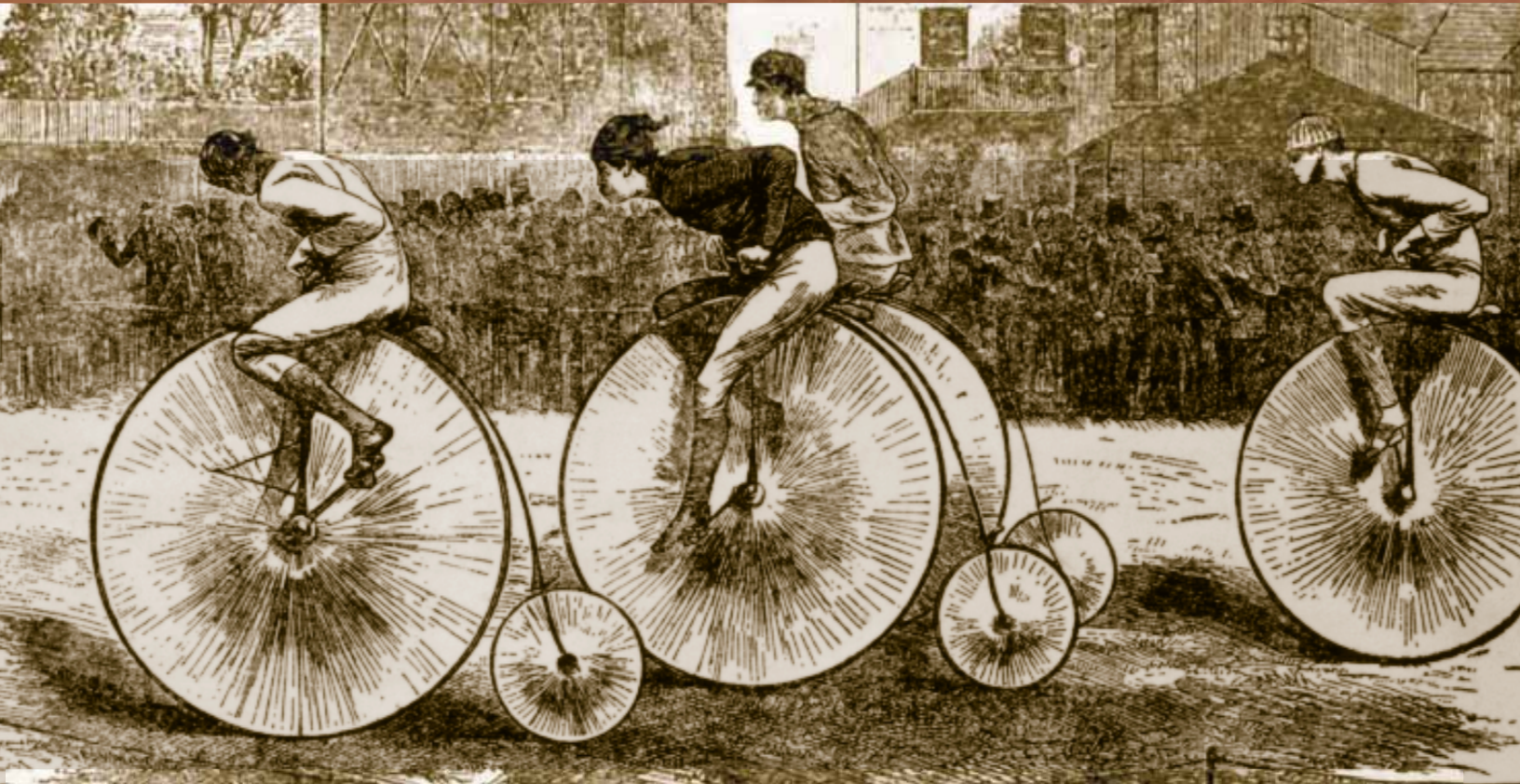


Government Finance Officers Association of Texas

Cycling Through Public Finance



Renaissance Austin Hotel April 11-13, 2010

The Penny-Farthing Bicycle

This term was probably not used until these bicycles were nearly outdated; the first recorded print reference is in 1891 in *Bicycling News*. It comes from the British penny and farthing coins, one much larger than the other, so that the side view resembles a penny leading a farthing.

ATTENTION!

If you are a public finance official for a city, county, agency, or special district who is:
Just starting your career as a public finance official,
Trying to advance your financial management expertise, or
Searching to wrap-up your tenure with more 'value-added' expertise...

THIS MEETING IS FOR YOU!

Sunday, April 11

7:30 a.m.

BRUCE TESTA ANNUAL GOLF OUTING

Avery Ranch Golf Club, 10500 Avery Club Drive

10:00 a.m. – Noon

CGFO STUDY GROUP

1:30 – 3:00 p.m.

COMMITTEE MEETINGS

Ethics Committee

FRRR Committee (GASB)

Membership Committee

Legislative Committee

Newsletter/Web Site Committee

Professional Development Committee

Program Development Committee

Scholarship, Fellowship, and Foundation Committee

Women's Public Finance Network

3:00 – 5:00 p.m.

GFOAT EXECUTIVE BOARD MEETING

3:00 – 5:30 p.m.

CGFO TESTING

4:00 – 6:00 p.m.

REGISTRATION

5:00 – 6:30 p.m.

WELCOME RECEPTION

8:30 p.m. – Midnight

TEXAS HOLD'EM

A donation of \$25 dollars to the GFOAT Foundation will be taken at the door.

7:00 – 9:00 p.m.

WOMEN'S PUBLIC FINANCE NETWORK VIVA CHOCOLATO PARTY (separate ticketed event - \$40):

Join us for the ultimate private chocolate party at Viva Choccolato. Viva spent years researching gourmet chocolate from around the world and forming exclusive partnerships to bring the world's finest chocolate collection to Texas. Viva offers dozens of specialty chocolate truffles and world-class chocolate creations sure to inspire and impress your taste buds.

Monday, April 12

7:00 a.m. – 5:00 p.m.

REGISTRATION

7:00 – 8:15 a.m.

NEW-MEMBER AND-NEW ATTENDEE BREAKFAST

This breakfast is for first-time attendees and new members to come and get an orientation to GFOAT. GFOAT Board members and committee chairs will be in attendance.

Moderator: GFOAT Membership Committee Co-Chair

Clifford Blackwell, Director of Administrative Services, City of Bedford

7:00 – 8:15 a.m.

NETWORKING BREAKFAST

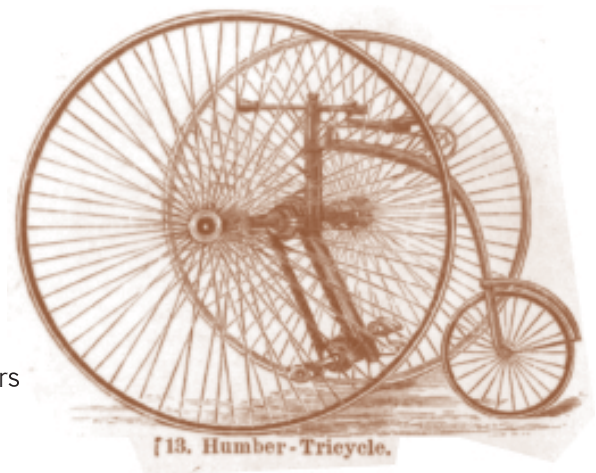
Breakfast buffet for all conference attendees

8:15 – 9:30 a.m.

WELCOME AND OPENING GENERAL SESSION (1.5 CGFO/CPE)

Moderator: GFOAT President **Kent Pfeil**, Director of Finance, City of Richardson

Keynote Speaker: **Evan Smith**, Editor-in-Chief and CEO, *Texas Tribune*



9:45 – 11:30 a.m.

CONCURRENT WORKSHOPS (2.0 CGFO/CPE)

Open Records/Open Meetings

Speakers: **Chris Schultz**, Assistant Attorney General, Office of the Texas Attorney General; and **Mary Kayser**, City Secretary, City of Garland

Accounting for Capital Assets: Using the New GFOA Manual

Speakers: **Keith A. Dagen**, CPA, Assistant Director of Finance, City of Richardson; and **John DeBurro**, CPA, Senior Audit Manager, Assurance Services, Weaver, LLP

11:30 a.m. – 12:45 p.m.

LUNCH, BUSINESS MEETING, AND AWARDS

Presiding: GFOAT President **Kent Pfeil**, Director of Finance, City of Richardson

1:00 – 2:00 p.m.

GENERAL SESSION (1.0 CGFO/CPE)

Living Within Our Means: Private and Public Sector Perspectives

Dr. Dotzour will discuss the outlook for the economy and job growth, along with the outlook for tax revenues from residential and commercial real estate, in the years ahead.

Guest Speaker: **Mark Dotzour**, Ph.D., Chief Economist, Real Estate Center at Texas A&M University

2:15 – 3:30 p.m.

CONCURRENT WORKSHOPS (1.5 CGFO/CPE)

Successful Succession Planning in the Public Sector

Speaker: **Randolph Moravec**, CFO, Town of Addison; and **Clay Caruthers**, Director of Finance, City of Hurst

New Finance Directors' Roundtable

Moderator: **Carolyn Marshall**, CPA

Speakers: **Bryan Langley**, Director of Finance, City of Denton; **Kathy DuBose**, Director of Finance, Town of Trophy Club; and **Keith Nelson**, Director of Finance, City of Deer Park

Long-Term Financial Planning: The Practical and the Political

Speakers: **Susan Morgan**, Sr. Financial Analyst, HDR Engineering, Inc. Austin; and **Roger C. Roecker**, CGFO, City Manager, City of Friendswood



3:30 – 4:00 p.m.
REFRESHMENT BREAK

4:00 – 5:00 p.m.
CONCURRENT WORKSHOPS (1.0 CGFO/CPE)

Developing Internal Controls in a Small Organization

Speakers: **Monica Kohlenberg**, CPA, CGFO, Audit Manager, Belt Harris and Associates;
and **Kelly Johnson**, City Secretary/Director of Finance, City of Bunker Hill Village

Is Social Media Right for You?

Speaker: **Greg Sowell**, Director of Communications, City of Richardson

Current Environment for Pensions and Retirement

Speaker: **Keith Brainard**, Director of Research, National Association of State Retirement Administrators

6:30 – 9:00 p.m.

NETWORKING EVENT - THE COUNTY LINE RESTAURANT

Join us for some award-winning, legendary barbeque, along with some great Hill Country views. The County Line is located at 6500 Bee Cave Road. Transportation will be provided.

TUESDAY, April 13

7:00 – 8:15 a.m.

NETWORKING BREAKFAST

Breakfast buffet for all conference attendees

8:30 – 9:30 a.m.
CONCURRENT WORKSHOPS (1.0 CGFO/CPE)

Franchise Fee Audits: What Now?

Speakers: **Connie Cannady**, Manager, J. Stowe & Company, Richardson; and
Laurie Brewer, Assistant Director of Finance, City of Georgetown

Governmental Accounting 101: The Basics

Speaker: **Terry Patton**, Ph.D., Midwestern State University, Wichita Falls

Creative Capital Infrastructure Financing

Speaker: **Chris Allen**, Senior Vice President, First Southwest Company, Austin

9:45 – 10:45 a.m.

CONCURRENT WORKSHOPS (1.0 CGFO/CPE)

Fundamentals of Budgeting and Finance

Speakers: **Clifford Blackwell**, Director of Administrative Services, City of Bedford; and
Joshua C. Selleck, Director of Finance, City of Cedar Park

Getting the Most from Your Banking Relationship

Moderator: **Andy Deskins**, Senior Vice President, Wells Fargo Bank, N.A.

Speakers: **Greg Houlette**, Senior Vice President, Happy State Bank, Canyon; and
Tim Kreitzer, Government Banking Manager, Wells Fargo Bank, N.A.

Successful Negotiations

Speaker: **Rita Kosnik**, Ph.D., Trinity University, San Antonio

10:45 – 11:10 a.m.

BREAK

11:10 a.m. – Noon

CLOSING SESSION (1.0 CGFO/CPE)

Sunset Review for State Agencies: What Effect Will It Have on Local Government?

Speaker: **Bennett Sandlin**, General Counsel, Texas Municipal League

GFOA Recommended Practices

Speaker: GFOA National Board Member **Bob Scott**, Assistant City Manager/CFO, City of Carrollton

Noon

DRAWING FOR DOOR PRIZES (MUST BE PRESENT TO WIN)



General Information

(Save \$25 by registering online at www.gfoat.org!)

REGISTRATION FEE:

DEEP DISCOUNT for Active GFOAT Members

By April 2 – GFOAT Active Member Only	\$225
By April 2 – GFOAT Member	\$300
After April 2 – GFOAT Member	\$350
By April 2 - GFOAT Non-Member	\$400
After April 2 – GFOAT Non-Member	\$450
First-Time Attendee	\$175
Student	\$ 85
Monday Night Networking Event Guest	\$ 45
Women's Public Finance Networking Event	\$ 40

HOTEL INFORMATION: The **Renaissance Austin Hotel** is the site for the 2010 GFOAT Spring Institute. The hotel, located at 9721 Arboretum Boulevard in Austin, has extended a room rate of \$166 single/double. In order to receive this special rate, your reservations **must** be made by **Friday, March 19**. To make a reservation, please call the hotel at **512-343-2626 or 800-468-3571** and mention that you are registered for the **GFOAT Spring Institute**. **The Renaissance Austin Hotel is a non-smoking facility.**

CANCELLATION AND SUBSTITUTION POLICY: If you are registered and cannot attend, we encourage you to send a substitute. If you cannot send a substitute, a \$45 cancellation fee will be assessed if written cancellation is received by **Friday, April 2**. **No refunds will be honored after that date.**

MONDAY NIGHT NETWORKING EVENT: If you are a registered GFOAT conference delegate, your badge will admit you to the event. Only purchase an optional ticket for a person who is not registered for the conference. **Ticketed events cannot be refunded after Friday, April 2.**

CONTINUING EDUCATION: An application has been submitted to the State Board of Accountancy for CEU/CPE continuing education units. CGFO credits will also be offered. No prerequisites are required for any session.

CONFIRMATIONS/BADGES: Conference badges will be mailed in advance. If you do not receive your packet in the mail, you can pick up your registration materials on site. **REMEMBER: BRING YOUR BADGE AND ANY OPTIONAL TICKETS YOU ORDERED TO THE CONFERENCE.**

General Information (continued)

CGFO TESTING: The Certified Government Finance Officer's exam will be offered from 3:00 – 5:30 p.m. on Sunday, April 11, at the Renaissance Austin Hotel. If you are interested in sitting for the test during this time, please contact Suzette Clair at suzette@gfoat.org or Becky Brooks at blbrooks@gfoat.org. Also, CGFO Committee Co-Chair Carl E. Wessels will host a study group meeting at the Renaissance Austin Hotel on April 11 from 10:00 a.m. until Noon.

SPECIAL ACCOMMODATIONS: Let us know on the registration form if you need special assistance of any kind. **WE WANT TO HELP!** In order to respond to any special requests, we would appreciate as much advance notice as possible. Thank you.

CAR RENTALS: AVIS discounts are available at www.avis.com or by calling **800-331-1600**. Your Avis World Wide Discount (AWD) Number is **J867208**. Enterprise Corporate Class discounts are available at www.enterprise.com or by calling **800-736-8222**. Your Corporate Class number, which is **Y21222**, can be assessed by entering the association acronym, **TEX**, at the Corporate Reservation section of the Web site.

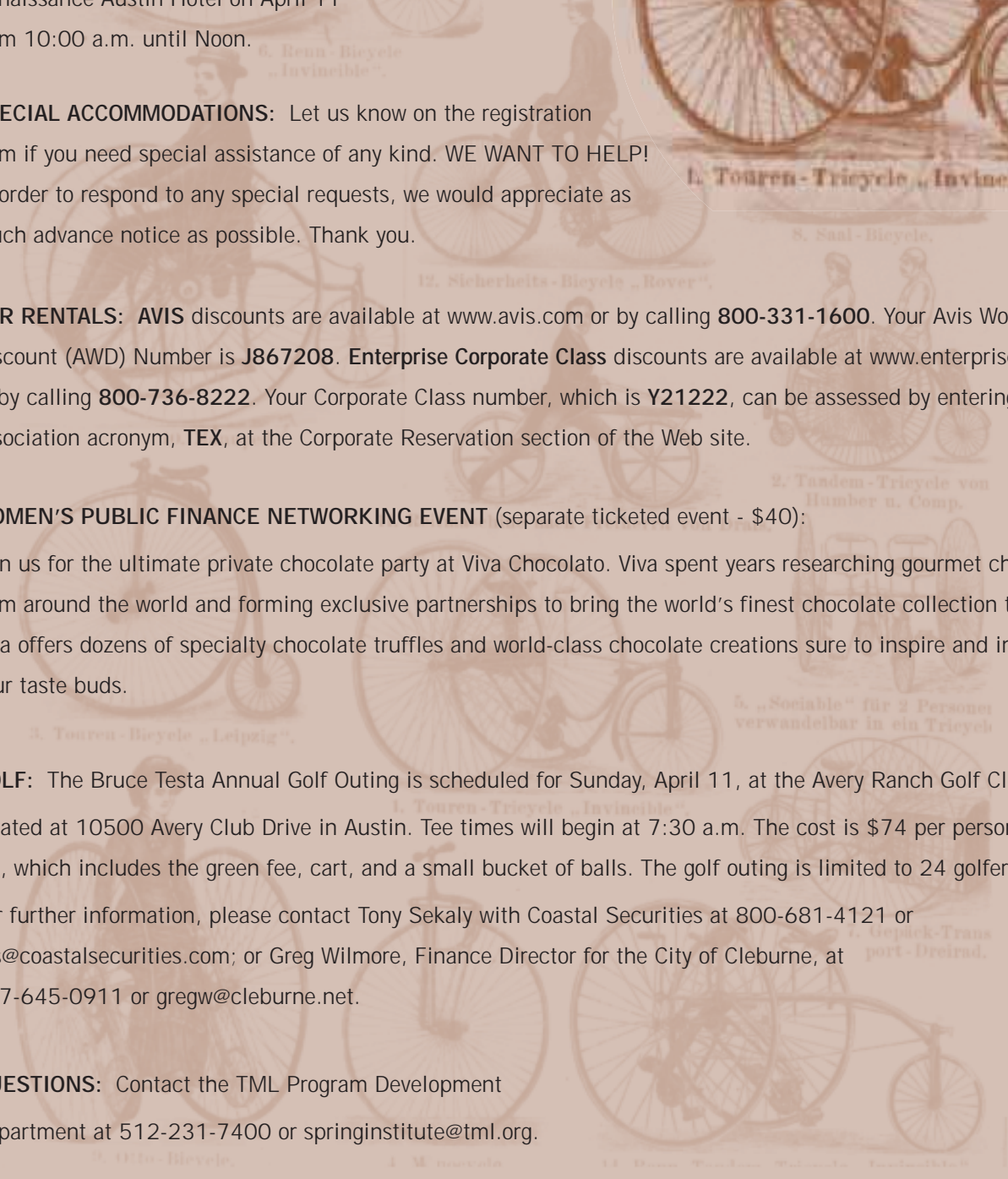
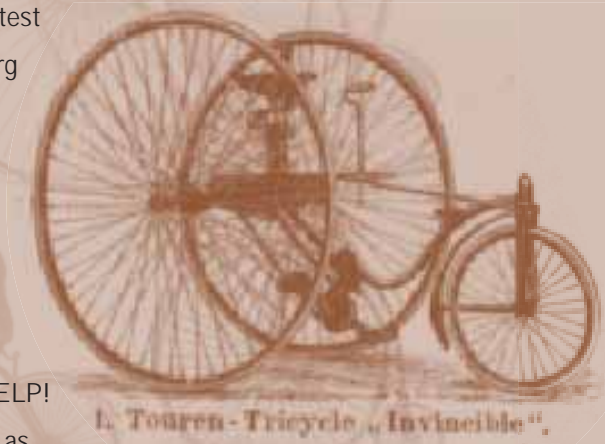
WOMEN'S PUBLIC FINANCE NETWORKING EVENT (separate ticketed event - \$40):

Join us for the ultimate private chocolate party at Viva Chocolate. Viva spent years researching gourmet chocolate from around the world and forming exclusive partnerships to bring the world's finest chocolate collection to Texas. Viva offers dozens of specialty chocolate truffles and world-class chocolate creations sure to inspire and impress your taste buds.

GOLF: The Bruce Testa Annual Golf Outing is scheduled for Sunday, April 11, at the Avery Ranch Golf Club, located at 10500 Avery Club Drive in Austin. Tee times will begin at 7:30 a.m. The cost is \$74 per person, plus tax, which includes the green fee, cart, and a small bucket of balls. The golf outing is limited to 24 golfers.

For further information, please contact Tony Sekaly with Coastal Securities at 800-681-4121 or tds@coastalsecurities.com; or Greg Wilmore, Finance Director for the City of Cleburne, at 817-645-0911 or gregw@cleburne.net.

QUESTIONS: Contact the TML Program Development Department at 512-231-7400 or springinstitute@tml.org.





GFOAT POST-INSTITUTE EVENTS (SEPARATE FEES)

Renaissance Austin Hotel

POST-INSTITUTE EVENTS

The Center for Public Management and GFOAT will sponsor a Public Funds Investment Act workshop on April 13-14, 2010, after the GFOAT Spring Institute, at the Renaissance Austin Hotel.

PUBLIC FUNDS INVESTMENT ACT WORKSHOP – TWO PARTS

April 13-14

\$140 each day (The fee includes lunch each day.)

The Public Funds Investment Act requires chief financial officers, treasurers, and investment officers of local governments to receive ten hours of investment training every two years. In addition, new investment officers are required to receive ten hours of training within the first twelve months after assuming their duties. A new two-year training cycle began on September 1, 2009. Completion of this two-part workshop satisfies this requirement.

Tuesday, April 13 – Part One

1:00 – 5:30 p.m. (Come early for lunch served at Noon in the meeting room.)

Wednesday, April 14 – Part Two

9:00 a.m. – 2:30 p.m.

HOW DO I REGISTER?

You can sign up on the registration form included in this brochure or at www.tml.org. The number of participants is limited, so register today.

Registration Form



THREE WAYS TO REGISTER: Your registration will not be processed until payment is received.

1. Register online with credit card payment at:
www.tml.org (click on "Training")
2. Fax this form with your credit card information to:
512-231-7495
3. Mail this form and your payment to:
TML Administrative Services
1821 Rutherford Lane, Suite 400
Austin, TX 78754-5128

If you are registered and cannot attend, we encourage you to send a substitute. If you cannot send a substitute, a **\$45 cancellation fee** will be assessed if written cancellation is received by **Friday, April 2**. No telephone cancellations will be accepted, and refunds are available for registration fees only. No refunds will be honored after **April 2**.

Please type or print below.

Full Name: _____ Badge Name: _____

Title: _____

City/Organization: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____ E-mail: _____

I require the following special accommodations:

Please select one:

DEEP DISCOUNT for Active GFOAT Members

By April 2 – GFOAT Active Member Only	\$225
By April 2 – GFOAT Member	\$300
After April 2 – GFOAT Member	\$350
By April 2 - GFOAT Non-Member	\$400
After April 2 – GFOAT Non-Member	\$450
First-Time Attendee	\$175
Student	\$ 85
Monday Night Networking Event Guest	\$ 45
Women's Public Finance Networking Event	\$ 40

Post-Conference Sessions:

Public Funds Investment Act Training - Part One (Tuesday)	\$140
Public Funds Investment Act Training - Part Two (Wednesday)	\$140

GRAND TOTAL \$ _____

Will you go to The County Line Restaurant on Monday evening? Yes No

If yes, will you ride the bus provided by GFOAT? Yes No

Required – Please indicate below the SESSIONS you will attend:

Monday 9:45 – 11:30 a.m. <input type="checkbox"/> <i>Open Records/Open Meetings</i> <input type="checkbox"/> <i>Accounting for Capital Assets: Using the New GFOA Manual</i>	Monday 2:15 – 3:30 p.m. <input type="checkbox"/> <i>Successful Succession Planning in the Public Sector</i> <input type="checkbox"/> <i>New Finance Directors' Roundtable</i> <input type="checkbox"/> <i>Long-Term Financial Planning: The Practical and the Political</i>	Monday 4:00 – 5:00 p.m. <input type="checkbox"/> <i>Developing Internal Controls in a Small Organization</i> <input type="checkbox"/> <i>Is Social Media Right for You?</i> <input type="checkbox"/> <i>Current Environment for Pensions and Retirement</i>	Tuesday 8:30 – 9:30 a.m. <input type="checkbox"/> <i>Franchise Fee Audits: What Now?</i> <input type="checkbox"/> <i>Governmental Accounting 101: The Basics</i> <input type="checkbox"/> <i>Creative Capital Infrastructure Financing</i>	Tuesday 9:45 – 10:45 a.m. <input type="checkbox"/> <i>Fundamentals of Budgeting and Finance</i> <input type="checkbox"/> <i>Getting the Most from Your Banking Relationship</i> <input type="checkbox"/> <i>Successful Negotiations</i>
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2010 GFOAT SPRING INSTITUTE

CREDIT CARD PAYMENTS:

MasterCard
 Visa
 Am Ex
 Discover

Cardholder's Name (Please Print) _____

Acct # _____

Signature _____

Exp. Date _____

FOR TML OFFICE USE ONLY:

Business Check _____ \$ _____

Personal Check _____ \$ _____

Total \$ _____

Batch No. _____

Id # _____

